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What's New

Version 9.2 release

All current customers should have already received the E-mail notice about version 9.2, which released on March 24th. If you are not yet a licensed user or you missed the announcement, you can read about the new features in the Release Notes:
http://www.campground-master.com/rel92/index.html

The download is available any time on our web site:
http://www.campground-master.com/download_upgrade.html

New Documentation Topics

We have added some new sections to the documentation to better explain some common issues. Please take a few minutes to look at these, if only to note that they exist if you need them in the future. Click on the links to jump directly to that topic in the online documentation.

- Reservation Linking Examples -- Some detailed examples of common tasks of creating or adding linked reservations (and the whole section on linking has been rearranged to be easier to reference)
- Monthly / Long-term Reservations -- Recommended methods of handling monthly or other long-term reservations are explained in detail.
- Transaction / reporting procedures -- Recommended methods of handling reservation transactions and common reporting issues are explained, such as how best to handle deposits.
- E-mailing receipts -- A basic explanation of how to start E-mailing receipts to your customers.
- Full network synchronization (quick method) -- A new "quick" method of solving synchronization issues has been added which should solve most issues, as long as you're using a current version of the software.

TLS 1.1 / 1.2 Support for Credit Card Processing

You may have been hearing about the new TLS 1.2 and 1.2 requirements coming soon for credit card processing. Support for this was added in version 9.1 last fall, so as long as you're staying current with Campground Master updates then you're already covered. Both 1.1 and 1.2 are supported (it will use the highest level requested).

Q & A

Fixed Charge in Addition to Per-unit Merchandise Rate

Q: I have a Merchandise Rate that's per-liter for propane (the Rate has "Ask for other quantity" selected), but I also need to automatically add a single HazMat fee (flat rate). Can that be done?

A: What you can do is add a 2nd Charge transaction to the same Rate definition that has the per-liter charge. For the HazMat Fee, enter the equal sign ("=", no quotes) in the Qty field and press Enter. That will open an Expression Creator for an expression to override the normal Qty. Just enter the number "1" for the expression (no quotes) and Save. Of course enter the Category, Description, and Each amount for the transaction as usual.

Now when you add the per-liter charge it will add the HazMat fee with a Qty of 1 no matter how many liters it is.

For reference, this is explained under "Using Calculated Expressions for Transaction Values" here:
http://campgroundmaster.com/help/editratedefinitiondialog.html

Customer E-mail Receipts

Q: Version 9.1 added some standard E-mail Receipt forms for Reservations, but I don't see them for Customers (e.g. through Customer Details, New/Edit Transactions). Can I E-mail a customer receipt?

A: First of all, I hope you understand that using Customer Reservations is dangerous if you don't have a specific need for it -- any transactions added there will not apply to their reservation(s).

That said -- there isn't a standard E-mail receipt for Customers, but there's a Sample you can import.

1. Go to Maintenance / Advanced Customizations / Forms

2. Click the Import Form(s) button, and you'll get a typical Windows file-open dialog labeled "Import Forms".

3. You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\Campground Master\Samples (most likely you just need to double-click the "Samples" folder to get there, but you may have to navigate to the C: drive first using the "Look In" drop down at the top").

4. Now select the appropriate file : "Sample Forms - E-mail Customer rcpt w transactions v9.1", and click Open.

Now you will have an "E-mail Form" button on Customer Details and also Customer Transactions, etc.

Handling a Temporary Stay on a "storage" Reservation

Q: We allow people to stay on their winter "storage" site at the normal daily rate. How do we track that without stopping the storage reservation to enter a new reservation for a day or two?

A: You can use a "Guest" reservation type to make a short-term reservation on top of the Storage reservation (or any long-term reservation). Since you probably don't want it handled the same way as a typical "Guest" (e.g. different rates), I would add a new Reservation Type for it (e.g. called "Storage stay" -- see Pick Lists for adding Reservation Types), but make the Base Type "Guest" so it can be booked on top of the normal storage reservation. If they are charged the same daily rate as your Normal reservations, just add that new Resv Type to the list of Resv Types on those rate definitions.

For more details on Guest reservations:
http://campgroundmaster.com/help/managingguests.html

Entering CVC code for Guarantees

Q: Since we take a lot of reservations over the phone, we need to take guests' security code or cvc-code for their credit card and there is no spot to do so in Campground Master. How might we do that other than writing it on a separate piece of paper?

A: According to new credit card merchant rules (PCI compliance), you are not allowed to store the CVC code on a computer, period. This is why it's no longer allowed in Campground Master.

It is never required to have the CVC code to run a charge, and as far as I know it won't make a difference in your fees. It's just an extra verification method. When the customer arrives, you should always swipe their card to get the lowest rate, in which case a CVC code is not needed anyway.

Reporting Site Income Per Day

Q: We need a report that gives us our earned income per day. For example, if a "Seasonal Camper" has paid $3000 and there are 214 nights in our season, the average "earned income" per day is $14.02 for that site. I did find in the sample Query imports an average daily amount paid, by site type. This reports the average income on the last day of the stay. I need a report or query that gives me the average income for the stay for each day of the stay, per site, not just site type. Is this possible? Thank you in advance for your assistance.

A: There is a sample query you can import for that: "Sample Query - Total revenue by site, by reservation dates"

It has the same linked-reservation issue as other transaction reports by site (all transactions are reported under the "Linked Master" site for linked reservations), but it does divide it up by day.

See the documentation for importing sample queries:
http://campgroundmaster.com/help/queriessetupdialog.html

Updating a Customer's Rig Size, etc.

Q: I have noticed on several occasions if a regular customer trades in for a new RV size, I will update the record for his RV size but any future Confirmations still show the old RV size.

A: There are 2 different places for Rig Size -- Customer Details (the Customer's information used the "next time"), and Reservation Details / Preferences (specific for that reservation, in case that customer doesn't always have the same rig). If you change it in the Reservation (either through Reservation Details or the New Reservation dialog), that does not automatically change the Customer Details. So be sure you also update Customer Details so the new size is used automatically for future reservations.

Tips & Techniques

Duplicating Reservations for Next Year

We're occasionally asked about an easy way of duplicating all of the current seasonal reservations for the following year. This can be done with Scripting, but it's a rather advanced procedure.

Version 9.2 includes a Sample "Package" with functions to copy a single reservation or all reservations shown on a tab view to another reservation with the same customer and dates the following year. **Please note that this should not just be used arbitrarily -- it's meant as a starting example you can use to customize for your particular needs, and some programming expertise is required.** As with all Advanced Customization features, standard support does not include helping with any issues arising from this.

To import it, go to Maintenance / Advanced Customizations / Import Package. Select the file "Sample Package - Copy reservations to next year" from the Samples folder under the Campground Master program files folder.

When this sample is imported, 2 new functions will be added to the right-click menu for most tab views (On Site, Arrivals, Departures, Payments Due, etc) -- "Copy this reservation to next year" and "Copy All Shown Reservations to next year".

Note that the sample scripts only copy the standard reservation fields. If you have created your own "User" fields, code for copying those will need to be added to the script "NewResvOnDates". Also note that it does not copy any charges/rates. Those will need to be added manually, or if you're using Auto-Rates then they will be added at the time of check-in.

Work Order Printable Form

There isn't a standard printable form for Work Orders in Campground Master (only the "record" can be printed, with limited text area). However, version 9.2 includes a Sample Form you can import to be able to print a much nicer Work Order form, and edit it if needed.

1. Go to Maintenance / Advanced Customizations / Forms.

2. Click the Import Form(s) button, and you'll get a typical Windows file dialog labeled "Import Forms". You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\Campground Master\Samples. Use the "Look In" drop-down box at the top of the dialog to navigate up to C: if necessary, then double-click each folder (Program Files, then Campground Master, then Samples) to get into the Samples folder.

3. Now select the file "Sample Forms - Work Order", and click Open.

The new form will appear at the bottom of the list. This sample form should work for most people. Note that there's an area in the form for "Completion notes", meant for hand-written notes by the person performing the work -- this does not come from a field in the database. Editing the form to rearrange fields or add any custom fields you've created is an advanced topic -- see the documentation for details.

To use the form, just open your Work Order (View / Work Orders, select and Edit a work order), and click "Print". Select "Print a Form for this record", and you will be able to select the form in the list, then Print.

Reporting Unmatched Security Deposits

The current method of entering Security Deposits (as a Charge transaction, and then adding a negating transaction when refunding it) is sufficient for most situations. However one thing that's difficult to do is find out how many "outstanding" security deposits you have, either for past reservations or for current/ future reservations.

The best way to handle this is by creating a Query that shows the total for Security Deposit transactions (since it should be zero once the original deposit is credited/refunded). Optionally you can use a filter condition that shows any reservation with a non-zero total for Security Deposit transactions, to show only those with outstanding balances.

Here's an example of creating a Query to do that, with various date-condition filtering if needed. Note that this example assumes you have a Transaction Category named "Security Deposit" that you've been using for this purpose, as described in the documentation here:
http://campgroundmaster.com/help/securitydeposits.html

(As with any Advanced Customization function, Queries can get pretty technical. We recommend reading through the documentation if you want to understand more about making custom queries. Normal support does not include help with Queries or other Advanced Customization functions.)

Follow these steps:

1. Go to Maintenance / Advanced Customizations / Queries.

2. Click "Add Query".

3. You'll be given a choice of List or Cross-table -- select "List Query".

4. Enter a name for the query -- e.g. "Unmatched Security Deposits"

5. Select "Reservations" for the Base Table.

6. Click "Quick-Add Fields". This is an easy way to select the fields (columns) you want to be shown in the report.

7. Double-click on each data field you need to see, changing the Data Table if needed to find appropriate fields -- e.g. First Night, Last Night, Site Name, Status, etc. for Reservations, then change to Customers table to select Last Name, etc. As you double-click each one in the left-hand column, it will move to the right-hand "Selected" column. If you have trouble double-clicking, you can click on the field and then click the "-->" button to move it over. Click "Done" when finished adding fields.

> <u>If you want to filer by a date or other criteria (as opposed to checking every reservation ever made):</u>
>
> 8. Click "Edit Filtering Conditions...", then click "Quick-Filter Auto-Builder". This will open the Reservation Selection Filter. For an "On Site" type query to show current reservations only, you would select Filter by date, and select "Start-to-end-inclusive". The option "Using the Query's from and to dates" will be selected by default, which is what you want. You can also select any other criteria (e.g. to include "Checked In" only). When done here, click OK. A prompt may ask whether to use text comparison for pick lists -- go ahead and click Yes.

9. If you want to *only* show those with Security Deposit balances, click "Edit Filtering Conditions..." (unless you did step 8, in which case you're already there). Click "Add New Condition". Enter this expression precisely:

```
LoopSum(1,NumTran(Resv()),"<i>",'-
TranBalAmount(ResvTran(<i>))','FieldText(ResvTran(<i>),"Tran_Cat") = "Security
Deposit"') != 0
```

Pay attention to spacing, whether quotes are single or double, etc. -- it must be exact. If you're viewing this in a format where the line wraps, do not start a new line -- there should be no hard line breaks. If possible, use Copy/Paste instead of typing it.

10. Click Done to get back to Edit List Query Definition.

11. Click Add Column, and enter the same expression from step 9. Then enter a Column heading (e.g. Security Deposits). Check the box "Show group totals", with "Sum" selected after that. Click Save.

12. You can click "Save & Test" to make sure it works OK if you like.

13. Save & Close, back to the main screen.

If this is your first query, you'll notice that a new "Queries" tab view has appeared between Payments Due and Transactions. Go to that tab view and select the new query from the list at the top. If you created a filter in step 8 to filter by date, set the From and To dates as needed.

Note that if you're filtering by date (step 8), you want to skip step 9 so it will include all filtered reservations even if they don't have a security deposit balance -- then you can verify that their balance is $0 instead of wondering whether they're being excluded for the wrong reason.

Adding 3% Credit Card Surcharge

There isn't a way to automatically add a 3% surcharge when paying by credit card, but this shows how to add a button to the Reservation Transactions dialog that will add a 3% Charge with the category "Surcharge" to the current balance. (If you don't have a Transaction Category called "Surcharge" yet, you will need to add that through the Pick Lists).

(As with any Advanced Customization function, this can get pretty technical. We recommend reading through the documentation if you want to understand more about making Dialog customizations. Normal support does not include help with Advanced Customization functions.)

If you've installed version 9.2, you can import the following sample Dialog and it will be done for you: "Sample Dialogs - Credit Card 3% surcharge button". (See the documentation for importing samples.) Also see the caveats below.

Otherwise, follow these steps:

1. Go to Maintenance / Advanced Customizations / Dialogs.

2. If you already have a dialog definition for the base dialog "Reservation Transactions", Edit that dialog to add this new element. Otherwise, click "Add dialog definition", enter a name for it (e.g. "Resv Trans"), check the "Add-on" box, and select "Reservation Transactions"

3. Click "Add element".

4. Select "Add New Control" for the element type.

5. Enter a control name, e.g. "addsurcharge".

6. Select the Control Type "Button"

7. Enter a position and size -- this can vary depending on your display settings, but for "normal" settings it should work to use Left=40, Right=245, Width=120, Height=18

8. Enter desired text for the button in Control Text, e.g. "Add 3% surcharge".

9. Click in the Action Expression box and enter the following expression in the Expression Creator:

```
DlgAddNewTransaction("Charge", "Surcharge", "3% cc surcharge", "", "", "", "",
ResvDue(Resv()), .03)
```

Pay attention to spacing, whether quotes are single or double, etc. -- it must be exact. If you're viewing this in a format where the line wraps, do not start a new line -- there should be no hard line breaks. If possible, use Copy/Paste instead of typing it.

10. Click Save.

11. Now you can use "Save & Test Dialog" to try it out. *Be aware that anything done in that test will be real transactions on whatever reservation it opens.*

Once satisfied, Save the dialog and Close out of Setup Dialogs.

Now some caveats --

This assumes they're going to pay the entire amount due -- otherwise you will need to manually adjust the Qty of the Surcharge transaction to be the amount they will be paying.

The above steps are just for the Reservation Transactions dialog. You can add similar functions on other dialogs (Unbound Transactions, Customer Transactions, and POS), but the expression will need to be different. Change the `ResvDue(Resv())` part according to the dialog type:

For Customer Transactions: `CustDue(Cust())`
For Unbound Transactions or POS: `DlgTransBal()` (requires version 9.2)